

DEC 29 2001 10 02

**APPLICATION OF JOHN J. GRACE**  
**FOR A**  
**SYSTEM FOR OPTIMIZING SELECTION OF A**  
**COLLEGE OR A UNIVERSITY AND A METHOD FOR**  
**UTILIZING THE SYSTEM PROVIDED BY A PROGRAM**

**ATTORNEY DOCKET 12595 B**

# **BACKGROUND OF THE INVENTION**

## **Field of the Invention:**

The present invention relates to a college planner. More particularly, the present invention relates to a system for optimizing selection of a college or a university and a method for utilizing the system provided by a program.

## **Description of the Prior Art:**

It is important to educate families about the high school to college transition so as to ensure that the student maximizes his/her opportunities during the high school to college transition process and guide students towards finding the best college or university for their specific situation. Additionally, it is important to educate families about academic and financial strategies and techniques that can make the transition between high school and college easier, not to mention make college more affordable.

Families must start planning for college as early as possible, because choosing the right high school classes is a critical step. Selective colleges consider every aspect of the high school career and can be stringent in their admission guidelines and requirements. Students must take into consideration appropriate college majors and corresponding careers and carry out specific activities each high school year to meet these considerations. Students must be prepared for the various examinations required by colleges and universities, such as the PSAT, the SAT I, and the ACT.

1 Parents must consider the financial aid process in order to enroll their student in  
2 college. A college will only offer incentives to a student when they know the student's  
3 abilities. Colleges truly appreciate being introduced to students that meet their criteria and fill  
4 a need at their school. Additionally, it is important to access merit-based financial aid. Merit-  
5 based financial aid can be awarded to students on the basis of their academic progress, state  
6 of residency, race, and/or artistic, athletic, or leadership qualifications. It does not take into  
7 account a family or student's income or assets.

8 It is important to consider the financial impact and quality of life issues involved with  
9 making a good career choice. Statistically, most students change their major three times over  
10 the course of their college career. Indecision can cost a student one, two, or more semesters  
11 of extra tuition and lost wages. This is extremely expensive when you consider the average  
12 cost of an American university is approximately \$13,500 per year. Furthermore, a student's  
13 grades can suffer when they start taking classes in a major that doesn't match their true  
14 interests. This can lead to loss of scholarship monies or, even worse, a total disinterest in  
15 his/her pursuit of a college degree.

16 Thus, there exist a need for a college planner that provides professional and accurate  
17 college major and career evaluation, assists in finding colleges that match the student's  
18 major(s) or area of interest, reduces college semesters, and as a result thereof, decreases the  
19 overall cost of college and allows beginning the college career and earnings earlier, provides  
20 advice on how to maximize the families time and effort, provides specific information about  
21 colleges' admission requirements, faculty, activities, facilities, student body, and financial aid  
22 offerings, allows completion of all pertinent activities and events before the deadlines, reduces  
23 the entire families stress by taking control of the process, allows informed decisions about the

1 each college to be made, allows beginning financial planning before it effects the potential  
2 financial aid package, arranges finances to maximize aid and minimize family contribution,  
3 ensures the financial aid officer is provided with of all important personal information that  
4 may increase a financial aid package, lowers overall college costs, provides a comprehensive  
5 solution for discovering all merit-aid awards available, provides accurate, up-to-date  
6 information about award requirements, availability *etc.*, helps students to set goals in order to  
7 qualify for award funding by finding the best awards available at the selected colleges,  
8 provides a comprehensive test-preparation package for all standardized tests, arranges a  
9 specific tutorial program for each student's specific needs, uses actual tests while providing  
10 a detailed skills analysis focusing on improving the students weak skills, and provides colleges  
11 with an early look at the student's abilities, talents, interests, and accomplishments..

## **SUMMARY OF THE INVENTION**

**ACCORDINGLY, AN OBJECT** of the present invention is to provide a system for optimizing selection of a college or a university and a method for utilizing the system provided by a program that avoids the disadvantages of the prior art.

**ANOTHER OBJECT** of the present invention is to provide a system for optimizing selection of a college or a university and a method for utilizing the system provided by a program that is simple to use.

**BRIEFLY STATED, STILL ANOTHER OBJECT** of the present invention is to provide a system for optimizing selection of a college or university and a method for utilizing the system provided by a program. The system includes a college planning questionnaire, college planning questionnaire software, and a college action plan. The college planning questionnaire collects data about a student's interests, aptitude, abilities, talents, and school selection preferences, and information about finances of the family from both the parents and the student. The college planning questionnaire software assists the student in filling out the college planning questionnaire by helping identify appropriate areas of interest or specific college majors by interactively conducting a battery of tests in order to perform a thorough analysis of the likes and dislikes of the student. The college action plan is designed to take the family through the entire college transition process, is created by information from the college planning questionnaire, and includes only colleges and universities offering degrees in the student's selected major(s).

1           The novel features which are considered characteristic of the present invention are set  
2   forth in the appended claims. The invention itself, however, both as to its construction and its  
3   method of operation, together with additional objects and advantages thereof, will be best  
4   understood from the following description of the specific embodiments when read and  
5   understood in connection with the accompanying drawing.

## BRIEF DESCRIPTION OF THE DRAWING

The figures of the drawing are briefly described as follows:

**FIGURES 1A-1DDD** are a system chart of the system for optimizing selection of a college or a university of the present invention; and

**FIGURES 2A-2CC** are a process flow chart of the method of the present invention for utilizing the system for optimizing selection of a college or university of the present invention shown in **FIGURES 1A-1DDD**.

# **LIST OF REFERENCE NUMERALS**

## **UTILIZED IN THE DRAWING**

3	10	system of present invention for optimizing selection of college or university
4	12	college planning questionnaire
5	14	college planning questionnaire software
6	16	college action plan
7	18	parents section of college planning questionnaire 12
8	20	student section of college planning questionnaire 12
9	21	printable report of college planning questionnaire software 14
10	22	hard copy of college action plan 16
11	24	video of college action plan 16
12	26	test preparation system of college action plan 16
13	28	profile worksheet of college action plan 16
14	30	ten major sections of hard copy 22 of college action plan 16
15	32	action item checklist at end of each section of ten major sections 30 of hard copy 22
16		of college action plan 16
17	34	appendix of hard copy 22 of college action plan 16
18	36	two main sections of ten major sections 30 of hard copy 22 of college action plan 16
19	38	financial aid section of two main sections 36 of ten major sections 30 of hard copy 22
20		of college action plan 16
21	40	college selection section of two main sections 36 of ten major sections 30 of hard copy
22		22 of college action plan 16



- 1    **42**    list of college selection section **40** of two main sections **36** of ten major sections **30** of  
2            hard copy **22** of college action plan **16**
- 3    **44**    two-page analysis of college selection section **40** of two main sections **36** of ten major  
4            sections **30** of hard copy **22** of college action plan **16**
- 5    **46**    thirteen short sections of appendix **34** of hard copy **22** of college action plan **16**
- 6    **48**    test preparation software of test preparation system **26** of college action plan **16**
- 7    **50**    SAT I video of test preparation system **26** of college action plan **16**
- 8    **52**    SAT I practice test booklet of test preparation system **26** of college action plan **16**

## **DETAILED DESCRIPTION OF**

## **THE PREFERRED EMBODIMENT**

Referring now to the figures, in which like numerals indicate like parts, and particularly to **FIGURES 1A-1DDD**, which are a system chart of the system for optimizing selection of a college or a university of the present invention, the system of the present invention is shown generally at **10** for optimizing selection of a college or a university for a student with parents forming a family.

The system **10** comprises a college planning questionnaire **12**, college planning questionnaire software **14**, and a college action plan **16**.

The college planning questionnaire **12** collects important data from the family including information about the interests of the student, the aptitude of the student, the abilities of the student, the talents of the student, and the selection preferences of the college or the university of the student, and further collects critical information about the finances of the family from both the parents and the student. The college planning questionnaire **12** is an extensive 12-page document that includes a parents section **18** to be completed by the parents and a student section **20** to be completed by the student.

The college planning questionnaire software **14**, preferably a CD, assists the student in filling out the college planning questionnaire **12** by helping the student identify appropriate areas of interest or specific college majors by virtue of the college planning questionnaire software **14** interactively conducting a battery of tests in order to perform a thorough analysis

1 of the likes and dislikes of the student so as to form choices. The college planning  
2 questionnaire software **14** compares the choices with corresponding college majors and  
3 potential career choices.

4 A printable report **21** is available after completing each of the battery of tests that  
5 allows the student to evaluate his/her interests. The printable report **21** provides information  
6 about how to select an appropriate college major or area of interest, and includes information  
7 about appropriate careers, annual income, industry outlook, and a brief job description of all  
8 different careers.

9 The college action plan **16** is designed to take the family through the entire college  
10 transition process, and is created by information from the college planning questionnaire **12**.  
11 The college action plan **16** includes only colleges and universities offering degrees in the  
12 student's selected major(s), and comprises a hard copy **22**, a video **24**, a test preparation system  
13 **26**, and a profile worksheet **28**.

14 The hard copy **22** of the college action plan **16** includes ten major sections **30**, with an  
15 action item checklist **32** at the end of each of the ten major sections **30** to assist the family in  
16 tracking their progress, and an appendix **34**. The ten major sections **30** of the hard copy **22**  
17 include two main sections **36** that are unique to each family and provide customized data  
18 derived from information on the college planning questionnaire **12**.

19 The two main sections **36** of the hard copy **22** include a financial aid section **38** and  
20 a college selection section **40**. The financial aid section **38** of the hard copy **22** is designed to  
21 help maximize a family's financial aid package through all available avenues as well as by

educating the family about how expected family contribution will be calculated so that the family can take a proactive approach. The financial aid section **38** provides the family with a detailed look at their current financial situation as it relates to paying for the college or the university, provides the family with an initial financial analysis and the expected family contribution, provides a true cost of attendance, lists the types and the amounts of financial aid typically offered, recommends specific strategies that the family could apply which may help lower the expected family contribution, and shows an adjusted statement of income and assets that the expected family contribution should look like if the family applied the recommended strategies.

The college selection section **40** provides a list **42** of 25 colleges and/or universities selected from a list of more than two thousand 4-year colleges and universities that best fit the needs of the student based on the answers of the student on the college planning questionnaire **12**, and are listed in order of affordability. The list **42** takes into consideration the GPA, the test scores, as well as the individual preferences of the student, such as specific states, specific majors, public/private, large, small, *etc.* The first entry on the list **42** is the college or the university that most closely matches the interests of the student and has the lowest out-of-pocket cost.

The college selection section **40** provides a detailed two-page analysis **44** of each college or university listed so that the family can make decisions about the merits of each college or university. Each two-page analysis **44** of a college or university includes a description of the college or university, the faculty and the student body at the college or university, the admission and academic programs detailing the requirements the student must meet in order to be eligible for acceptance to the college or university, the available student

1 activities and services including descriptions of available housing facilities and computer labs  
2 at the college or university, available intercollegiate and intramural athletics at the college or  
3 university, the scores needed on advanced placement tests to generate college credit at the  
4 college or university, and an overview of the financial aid offerings of the college or university  
5 including what specific out-of-pocket costs would there be, a standardized cost of attendance  
6 so as to ensure that the family compares true costs, information about the amount of gift aid  
7 and self-help aid that is historically available based on the expected family contribution, and  
8 how much is historically given in funding that the family will not have to pay back (gift aid)  
9 versus funding the family will have to pay back or earn (work-study and loans).

10 The appendix 34 of the hard copy 22 includes thirteen short sections 46, while the  
11 video 24 of the college action plan 16 provides an overview of the hard copy 22 of the college  
12 action plan 16.

13 The test preparation system 26 of the college action plan 16 is designed to give the  
14 student thorough and interactive preparation and a review of the various tests required by  
15 colleges and universities, and identifies weak areas of the student and arranges a specific  
16 tutorial program for each specific need of the student. The test preparation system 26 includes  
17 test preparation software 48 for the PSAT, the SAT I, and the ACT, preferably a CD, a SAT  
18 I video 50, and a SAT I practice test booklet 52.

19 The profile worksheet 28 of the college action plan 16 is used to promote the student  
20 to colleges and/or universities based on the abilities and performances of the student. The area  
21 of profiling is based on the student's indication on the college planning questionnaire 12, and  
22 includes academic based on the academic achievements of the student, artistic based on the

1 excellence in the fine arts or the performing arts of the student, and athletic based on the ability  
2 of the student to play collegiate sports.

3 The method for utilizing the system **10** for optimizing selection of a college or a  
4 university by a program can best be seen in **FIGURES 2A-2CC**, which are a process flow  
5 chart of the method of the present invention for utilizing the system for optimizing selection  
6 of a college or university of the present invention shown in **FIGURES 1A-1DDD**, and as  
7 such, will be discussed with reference thereto.

8 **STEP 1:** Enroll, by the family, in the program.

9 **STEP 2:** Receive, by the family from the program, the college planning questionnaire  
10 software **14** and the college planning questionnaire **12**.

11 **STEP 3:** Utilize, by the student, the college planning questionnaire software **14** to assist  
12 in filling out the college planning questionnaire **12**, by virtue of the college  
13 planning questionnaire software **14** conducting a battery of tests in order to  
14 perform a thorough analysis of the likes and dislikes of the student and help the  
15 student identify appropriate areas of interest or specific college majors so as to  
16 form results.

17 **STEP 4:** Compare, by the college planning questionnaire software **14**, the results of the  
18 student with corresponding college majors and potential career choices.

1     **STEP 5:**     Print the printable report **21**, by the college planning questionnaire software **14**,  
2                   after completing each test to allow the student to evaluate his/her interests and  
3                   have information about appropriate careers, annual income, industry outlook,  
4                   and a brief job description of all the different careers.

5     **STEP 6:**     Transfer, by the student, the results to the student section **20** of the college  
6                   planning questionnaire **12**.

7     **STEP 7:**     Complete, by the student, the student section **20** of the college planning  
8                   questionnaire **12**, and complete, by the parents, the parents section **18** of the  
9                   college planning questionnaire **12** so as to form a completed college planning  
10                  questionnaire which collects information from the family including  
11                  information about the interests, aptitude, abilities, talents, and college selection  
12                  preferences of the student and critical information about the finances of the  
13                  family from both the parents and the student.

14    **STEP 8:**     Mail, by the family to the program, the completed college planning  
15                   questionnaire.

16    **STEP 9:**     Receive, by the program from the family, the completed college planning  
17                   questionnaire.

18    **STEP 10:**    Log in, by the program, the completed college planning questionnaire.

- 1    **STEP 11:**    Input, by the program, the completed college planning questionnaire into a  
2                    database.
- 3    **STEP 12:**    Create, by the program, the college action plan 16 which takes the family  
4                    through the entire college transition process by utilizing the information from  
5                    the completed college planning questionnaire.
- 6    **STEP 13:**    Review, by the program, the college action plan 16.
- 7    **STEP 14:**    Determine, by the program, if additional information is needed.
- 8    **STEP 15:**    Provide, by the family to the program, the additional information, if answer to  
9                    **STEP 14** is yes and proceed directly to **STEP 17**.
- 10   **STEP 16:**    Proceed directly to **STEP 17**, if answer to **STEP 14** is no.
- 11   **STEP 17:**    Conduct, by the program, a final quality assurance of the college action plan  
12                    16.
- 13   **STEP 18:**    Mail, by the program to the family, the college action plan 16.
- 14   **STEP 19:**    Document, by the program, the event.
- 15   **STEP 20:**    Produce, by the program, appropriate reports.



- 1     **STEP 21:**     Receive, by the family from the program, the college action plan 16.
- 2     **STEP 22:**     Read, by the family, the hard copy 22 of the college action plan 16.
- 3     **STEP 23:**     Watch, by the family, the video 24 of the college action plan 16.
- 4     **STEP 24:**     Utilize, by the family, the action item checklist 32 at the end of each section of  
5                     the hard copy 22 of the college action plan 16 to assist the family in their  
6                     progress through the college action plan 16.
- 7     **STEP 25:**     Utilize, by the family, the financial aid section 38 of the college action plan 16  
8                     to provide the family with a detailed look at their current financial situation as  
9                     it relates to paying for the college or the university by providing an initial  
10                    financial analysis and an expected family contribution as well as by educating  
11                    the family about how the expected family contribution will be calculated so  
12                    that the family can take a proactive approach and maximize a financial aid  
13                    package through all available avenues.
- 14    **STEP 26:**     Recommend, by the financial aid section 38, specific strategies that the family  
15                     could apply which may help lower their expected financial contribution so as  
16                     to form recommended strategies.
- 17    **STEP 27:**     Illustrate, by the financial aid section, an adjusted statement of income and  
18                     assets showing what the expected family contribution should look like if the  
19                     family applied the recommended strategies.

1     **STEP 28:**     Determine, by the family, if the recommended strategies are to applied.

2     **STEP 29:**     Apply, by the family, the recommended strategies, if answer to **STEP 28** is yes  
3                     and proceed directly to **STEP 31**.

4     **STEP 30:**     Proceed directly to **STEP 31**, if answer to **STEP 28** is no.

5     **STEP 31:**     Illustrate the list **42** in the college selection section **40** of the college action  
6                     plan **16**, in order of affordability, 25 colleges and/or universities selected from  
7                     a list of more than two thousand 4-year colleges and universities that best fit  
8                     the needs of the student based on the information from the completed college  
9                     planning questionnaire including the student's GPA, test scores, as well as their  
10                    individual preferences specific states, specific majors, public/private, large,  
11                    small, *etc.*

12    **STEP 32:**     Illustrate, by the college selection section **40**, the detailed two-page analysis **44**  
13                     of each college or university listed so that the family can make decisions about  
14                     the merits of each college or university, wherein each two-page analysis **44**  
15                     includes a description of the college or university, the faculty and the student  
16                     body at the college or university, the admission and academic programs  
17                     detailing the requirements a student must meet in order to be eligible for  
18                     acceptance to the college or university, the available student activities and  
19                     services including descriptions of available housing facilities and computer  
20                     labs at the college or university, available intercollegiate and intramural  
21                     athletics at the college or university, the scores needed on advanced placement

1 tests to generate college credit at the college university, and a financial  
2 overview of the college or university including what the student's specific  
3 out-of-pocket costs would be so as to provide a standardized cost of attendance  
4 so as to ensure that the family is comparing true costs and information about  
5 the amount of gift aid and self-help aid versus work-study and loans that is  
6 historically available based on the family's specific expected financial  
7 contribution.

8 **STEP 33:** Utilize, by the student, the test preparation software 48 for the PSAT, the SAT  
9 I, and the ACT, the SAT I video 50, and the SAT I practice test booklet 52 of  
10 the test preparation system 26 of the college action plan 16 so as to give the  
11 student thorough and interactive preparation, a review of the various tests  
12 required by colleges and universities, an identification of weak areas of the  
13 student, and a specific tutorial program for each specific need of the student.

14 **STEP 34:** Complete the profile worksheet 28 of the college action plan 16, by the student,  
15 to promote the student to colleges and universities based on the abilities and  
16 performances of the student in areas of profiling based on the student's  
17 indication on the completed college planning questionnaire, wherein the areas  
18 include academic based on the academic achievements of the student, artistic  
19 based on the excellence in the fine arts or the performing arts of the student,  
20 and athletic based on the ability of the student to play collegiate sports.

21 **STEP 35:** Determine, by the family, if the family has questions about the college action  
22 plan 16.

1     **STEP 36:**     Contact, by the family, the program, if answer to **STEP 35** is yes.

2     **STEP 37:**     Answer, by the program, the questions about the college action plan 16, if  
3                     **STEP 36** is implemented.

4             It will be understood that each of the elements described above, or two or more  
5     together, may also find a useful application in other types of constructions differing from the  
6     types described above.

7             While the invention has been illustrated and described as embodied in a system for  
8     optimizing selection of a college or a university and a method for utilizing the system,  
9     however, it is not limited to the details shown, since it will be understood that various  
10    omissions, modifications, substitutions and changes in the forms and details of the device  
11    illustrated and its operation can be made by those skilled in the art without departing in any  
12    way from the spirit of the present invention.

13            Without further analysis, the foregoing will so fully reveal the gist of the present  
14    invention that others can, by applying current knowledge, readily adapt it for various  
15    applications without omitting features that, from the standpoint of prior art, fairly constitute  
16    characteristics of the generic or specific aspects of this invention.